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yes combines VOD, DVR and HD in a powerful package

Close work with technology partners and the willingness to take risks were the vital ingredients in the creation of the new hybrid service from Israeli satellite broadcaster yes. World Vision talks to Itzhak Elyakim, VP of Engineering and CTO at yes.

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Electronic publishers benefit from the pay-TV experience

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Americans continue to love their cable TV, but they want it to provide more functionality. That is the overall conclusion of a recent survey of cable users in the US, conducted by NDS. Watching TV shows on the PC and user-generated video are still far from being mainstream activities.

The TV is still the screen of choice for most American cable subscribers, but users want their cable operators to provide considerably more Internet-like functionality on the TV, according to a detailed survey of cable users in the US conducted by NDS.

User generated video on such social networking sites as YouTube, Facebook and MySpace poses little threat to the dominance of the TV. Thirty-two percent of the 1,041 respondents to the survey said that they didn't watch user-generated video at all and, of those who did watch it, 58% did so for less than five hours a week.

Watching TV shows on the PC is also far from being a mainstream activity. Fifty-seven percent of the respondents said they didn't do it at all, and only 2% reported doing it for more than 11 hours a week. By comparison, 50% said they watched TV for more than 11 hours a week.

It's not as if people are not using the Internet. They're just not using it to watch much video. In all age groups except for the over- 50s and 60s, the most serious TV watchers were even more serious Internet users. Overall, 29% of the respondents reported watching more than 16 hours of TV a week, while 32% reported more than 16 hours a week on the Internet.

Asked what additional services they would like in their cable TV package, respondents opted for more HD shows, more channels, TV shows from other countries and interactive services, such as games. But those choices were split fairly evenly, with no option chosen by more than 27% of the respondents.

Games, local content and recommendations on subscriber wish-lists

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Likewise, when asked to choose applications they would like to see in their TV service, the choices were fairly evenly split between local weather, local movie listings, TV recommendations and games. Given that all those functions are readily available on the Internet, the results indicate – though perhaps not conclusively – that many cable subscribers would like to have more Internet-like functionality on the TV.

Recommendations from friends and family are one of the ways that 56% of respondents find out about new TV programs. Not surprisingly, 22% would like to send these recommendations to their friends from their TV. Another 28% would like to be able to chat with friends while watching programs and 15% would like to join groups to see what other similarly minded people are watching.

The numbers get higher when respondents are sorted by DVR ownership, indicating that the people with greater command over their video experience want more functionality. Age is also a determining factor, with 62% of the teens and 42% of the people in their 30s saying they want to chat with their friends on TV. In general, respondents in four of the six age groupings, the teens, 20s, 30s and 40s, want much more social interactivity from their TVs.

Subscribers are looking to do more with their cable TV service

“What these results pointed out most strongly to us was that subscribers are looking to do more with their cable TV service. They want to interact with their family and friends and to have the ability to move their programming throughout the home without complication. What they may not realize is that technology today already allows for this convergence,” said Jesper Knutsson, Vice President and General Manager of NDS Americas, Sales. “This is an exciting time for the US cable market as new technologies are enabling us to develop next-generation tools and widgets that will make the viewing experience all the more enjoyable and even more useful in our daily lives.”

The survey reaffirms the centrality of TV in the lives of most American cable subscribers. Thirty-five percent of the respondents described their cable TV service as a necessity, while 48% described it as a luxury that “I wouldn’t want to live without.” Americans love their cable TV. They just want it to deliver more.

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CUSTOMER
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yes combines VOD, DVR and HD in a powerful package

Close work with technology partners and the willingness to take risks were the vital ingredients in the creation of the new hybrid service from Israeli satellite broadcaster yes. Customer satisfaction is high, the company says.

Many of the major shifts that are shaping the global pay television industry are exemplified by Israeli satellite operator yes, whose yes MaxTOTAL service went into full operation in March this year. In a relatively small and highly competitive market, yes chose to stretch the technological envelope with a full hybrid service that sets new standards for usability, response times and overall engineering.

yes MaxTOTAL is a formidable technological milestone, featuring 11 HD channels, DVR with a massive 500GB disk and over-the-top (OTT) VOD delivered over the public Internet. Initial customer surveys show extremely high satisfaction rates with the new service, says Itzhak Elyakim, VP of Engineering and CTO at yes.

Elyakim attributes at least part of the satisfaction to the customer experience, which, in turn, rests on the innovative ways in which yes resolved the engineering issues involved in delivering a full hybrid package of satellite TV and OTT VOD. The challenges that faced yes when it embarked on the project included:

- Providing a high-quality VOD service over the choppy, unpredictable bandwidth of the Internet;
- Creating a seamless user interface, integrating broadcast, stored and on-demand content;
- An efficient, cost-effective home installation, including, where necessary, integration with the home IP network.

Completing the project required significant ‘paradigm-busting’

Each challenge presented a “paradigm busting” opportunity for a company which

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is already a pioneer in the home entertainment industry and which constantly strives to set the mark higher.

For VOD delivery, yes chose to use progressive download, based on the NDS progressive download VOD solution, with variable bit-rate (VBR) encoding, instead of video streaming. The solution requires a minimum of 1.5 Mb bandwidth, which is well below the average household connection in Israel. Waiting time for the creation of the initial buffer is an incredibly low 10-15 seconds for a full VOD movie.

To achieve such excellence, yes built – and maintains – its own content distribution network (CDN.) VOD assets are replicated to servers throughout the network, thus providing yes with significant control over asset delivery and network load. The decision to invest in its own CDN is a clear indication of the company's belief in VOD as a critical component of its future revenue stream.

yes MaxTOTAL has a fully-integrated EPG, providing simple and undifferentiated access to broadcast channels, recorded DVR content and VOD assets. The NDS-built EPG has a full-HD GUI, even for SD programming, a content search function and a detailed VOD catalogue, including posters and trailers.

Customers are quick to adapt and do not really care where their content comes from, says Elyakim

VOD is available as free VOD, subscription VOD (SVOD) and pay-per-view.

Customers are quick to adapt and do not really care where their entertainment comes from, Elyakim says. The issues that do concern them are simple navigation, speedy response times and a friendly interface.

In opting for OTT VOD, yes deliberately stepped beyond its comfort zone - the "safe" confines of the broadcast delivery system and the broadcast-only STB. One of the many new challenges it has to deal with is connecting to the ADSL in the customer's home. Elyakim makes it clear that to get the kind of customer response and satisfaction rating that yes has been getting; the operator has had to devote just as much attention to the last few meters as to the whole process.

The household ADSL connection is typically in a work room or study, i.e. a considerable distance from the set-top box (STB) and satellite connection in the living room. In each home they enter, yes technicians are confronted by the same challenge, though in endlessly variable forms: how to connect the STB to the ADSL without breaking walls or trailing long cables across the floor.

yes technicians use a range of existing in-house solutions, ranging from CAT-5, to IP over coax (a technology known as HPNA) and IP over power lines (known as PLC.) The company is also testing wireless solutions.

In building the infrastructure for its MaxTOTAL service, yes has achieved a feat of engineering that is rare in the pay-TV industry. Elyakim is quick to point out that yes would not have been able to do it without its technical partners. These include NDS (EPG, VideoGuard DRM and the NDS Unified Headend, as well as the progressive download VOD technology and more), Pilat (adaptation of its IBMS content management system,) ADB (STB,) Harmonics (encoding and CDN) and Radware (networking and load balancing.)

Yes MaxTOTAL is another innovative solution from a TV operator that prides

itself on being a technology leader. It will be interesting to see what else yes has up its corporate sleeve.

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The recent surge of interest in electronic tablets – which peaked with the launch of the Apple iPad in early April - has rekindled hopes for a new and bright digital future for print publishers.

NDS is playing its part in making those hopes a reality, by unveiling an e-publishing solution which enables the publishing industry to repurpose its content, efficiently and securely, for publication on the new reading devices.

The NDS e-publishing solution is a powerful and comprehensive toolset for monetizing content prepared for print. Based on the company's 20-plus years of experience in protecting video content and managing its display, the NDS platform provides print publishers with the opportunity of benefiting from the digital experience of the pay-TV industry, rather than going the way of the music industry.

The digital revolution has not been kind to print publishers. Those who have weathered it best are the book publishers, for whom digital copying is still a relatively new challenge. But, as e-reader penetration increases, and with both the Nook from Barnes and Noble and the Kindle from Amazon already reported to be hacked, they are going to have to contend with it sooner rather than later – or face a deluge of copied e-books freely available on the Internet.

Newspapers need to provide a user experience that is far superior to that of the browser

The newspaper and magazine industry, on the other hand, has already suffered significant damage from its initial enthusiasm to give its content away for free on the Internet, in the hope that online advertising would cover the difference. It didn't, with the result that newspapers and magazines around the world are today facing low readership, plummeting subscriptions and lackluster advertising

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on both their print and their online properties, competition from free content on the Internet means that newspapers now looking to derive revenue from publishing on e-readers need to provide a user experience that is far superior to that of the browser. That includes enriching and personalizing the content, targeting display advertising for specific groups of users and supporting sophisticated business rules and models in order to accommodate different consumption patterns.

The NDS e-publishing solution is a flexible and efficient intermediary between the electronic pagination system on which the newspaper or magazine is prepared for print and the diverse population of e-readers on which it will be displayed. NDS takes the output from the pagination system, converts it into an XML file and then manipulates the file by means of a variety of tools and templates.

This process includes:

- **Enrichment** – such as converting static stock prices into a real-time feed; adding a series of photographs where there was only one in the original; supplementing an article with video, and so on.
- **Page templates** – The system has a unique compression feature, which enables the look & feel of a broadsheet page to be retained on a small screen by truncating the text in the articles while retaining the headlines and graphic elements.
- **Device Templates** – Matching the content to device characteristics, such as aspect ratio.
- **Navigation templates** – Adapting content navigation to device capabilities, including touch-screen, available buttons, horizontal/vertical viewing etc.

Advertising remains the essential revenue stream for publishers

Advertising is the essential revenue stream for newspaper and magazine publishers; the challenge is to do it better, utilizing the capabilities of the e-readers and the networks to which they're connected. For that, the NDS e-publishing solution incorporates NDS Dynamic™, the company's addressable advertising system.

A print ad may be relevant to the page on which it appears, if at all, but every article in the electronic version can carry an ad relevant to either the viewer or the context. NDS Dynamic can target each ad to the specific user, based either on knowledge of the user's situation (geographic, familial, preferences etc.) or on the context of the item being read.

Thus, the ad inventory can be far larger than that of the print product and the placement of each ad can be far more pertinent for the individual consumer. NDS Dynamic also provides reporting tools for in-depth analysis of advertising efficacy.

MacMillan, one of the world's leading book publishers, recently broke Amazon's price stranglehold on the e-books it sells on its portal. That showdown highlighted a key concern of the publishers: they need to be able to price their products according to their own criteria and to use all sales channels available. The Offer Manager module of the NDS e-publishing system gives them the

support they need, by attaching a business model and a price to any content component, from a full newspaper, to a section or to a single article. The models supported include subscription, purchase, pay-per-use, lending (e.g. for library purposes,) gifting and more.

If readers flock to e-books and tablets, hackers will follow

Where there's payment, there's invariably theft. The future of e-publishing could well depend on how well the content and the devices on which it is displayed are secured. The example of the music industry is all too clear in this respect. If reading books on electronic devices becomes truly popular, hackers will follow. NDS ReaderGuard™, the e-publishing DRM system, provides the required protection on three levels:

- **Service protection** – ensuring that the content is accessible only to the entitled user and cannot be extracted or otherwise used;
- **Content protection** – enforcing the business rules associated with the content;
- **Device protection** – ensuring that the e-reader is not tampered with or modified.

All the strands of the e-publishing service are tied together by NDS NewsTablet™ the middleware in the e-reader. NewsTablet receives the content from the headend and acts as an abstraction layer, ensuring uniform rendering across all devices. It's many functions include managing the network connection (WiFi, 3G, WiMAX etc.), managing the device's power consumption, storing archival content and, of course, providing a superior user experience.

The first venture onto the Internet by many publishers was not profitable. They need powerful tools and reliable support if their second digital experience is to be more successful. The NDS e-publishing solution is such a tool. It enables them to provide a cutting-edge service under their own branding and bearing their own look & feel, without being restricted to a specific sales portal or device.



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INDUSTRY
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What's even more HD than HD?

With HD already in the TV mainstream and the roll-out of Sky 3D, the question being asked now is: what's next in viewing technology?

One intriguing possibility is Ultra HDTV (UHDTV,) a technology which reputedly will make HD look old and blurry – if it ever gets to commercial deployment. The new technology (which is also known as Super HiVision) will be a staggering 16 times sharper than HD, with a resolution of 7680 × 4320 pixels. Both NHK in Japan and the BBC in the UK have expressed interest in the experimental format and the Japanese government has formed a public-private partnership to develop the necessary technologies to support it.

Every part of the TV value chain will need to be developed from scratch

Ultra HD is going to need a lot of support, including massive investment in bandwidth and other infrastructure. Every part of the value chain, from cameras to compression technologies, has to be developed from scratch, in order to store, manipulate and deliver videos which, when uncompressed, will run into multiple terabytes.

While still experimental, Ultra HD is not new. NHK, the BBC and other companies have been prototyping components of the end-to-end system since 2003 and systems have been shown at industry exhibitions (NAB, IBC and CES) for the past four years.

Nevertheless, there are still several obstacles to overcome. Optimistic projections in Japan talk about an experimental roll-out in 2015, while other projects are eyeing 2017 as a likely release date.

That's actually not a bad development rate in the greater scheme of things. It took HD 26 years to get from initial testing to mass commercial deployment.

Some skeptics worry about whether UHDTV will be overkill for the processing power of the human brain or whether the intensity of the experience will lead to mass headaches. Such concerns have not prevented the deployment of technologies in the past – think of the still-unresolved debate about the dangers

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of the radiation from mobile phones – and they are unlikely to deter us from feasting our eyes and ears on Ultra HDTV when the time comes.

Asia leads the world in TV subs

Asia dominates the number of worldwide pay-TV subscription, accounting for slightly more than 50% of subscribers in 2010, according to the In-Stat research organisation. China alone will encompass 26.3% of the total, followed by the rest of Asia Pacific at 22.3%, North America 15.3% and Western Europe 15.6%.

Another research organization, Media Partners Asia, also rated China as the largest market worldwide, with over 66 million digital pay-TV subscribers. That number is predicted to reach 198 million subscribers by 2014, the company said. In parallel, cable TV revenues will increase from \$9 billion in 2009 to \$17 billion in 2014.

Asia will continue to represent over 50% of the subscribers through 2014

By 2012, there will be nearly 750 million pay-TV subscribers worldwide. Asia will continue to represent over 50% of the subscribers through 2014, when total subscribers are expected to reach 855 million.

As the Asian market continues to grow it will vastly surpass Western markets in terms of size and maturity of technology - with initiatives in China such as Three Network Convergence and Next Generation Broadcast (NGB) set to catalyse the adoption of a new specification of digital TV technology.

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Enormous potential is one of the few things that the national TV markets in Central and Eastern Europe have in common. All platforms are expected to show strong growth in the near future, with digital terrestrial penetrating at the fastest rate and hybrid broadcast and IPTV making an appearance.

Intensified digitisation and the increased penetration of Digital Terrestrial Television (DTT) are likely to characterise the Central and Eastern Europe (CEE) TV market in the near future, according to Yves Padrines, Vice President, Business Development at NDS and General Manager of NDS GmbH.

CEE national economies, including Russia, have enjoyed rapid expansion since 2004, growing at more than double the growth rate of markets in Western Europe. In 2007, the number of pay-TV subscribers in the CEE grew by 18%.

The Eastern European pay-TV market is dominated by cable, which accounts for 80% of all pay-TV homes. Cable television is expected to go through a period of consolidation over the next two to three years, with the major operators growing their market share primarily through mergers and acquisitions.

The satellite pay-TV market, all of which is digital, is expected to more than double by 2012. Consumer demand for pay-TV has grown as economies have improved, with increasing numbers of channels being a key driver. The satellite pay-TV sector in CEE is becoming increasingly crowded, with several national markets now having multiple players.

DTH has benefited from slow past deployment of DTT

One reason for the boom in Direct To Home (DTH) satellite is the fact that DTT has yet to launch fully in the region. The experiences of Romania and Poland have shown that satellite TV can expand very rapidly in DTT-free markets, taking advantage of the lack of competition in rural areas and the smaller cities.

This year could see the commercial arrival of Hybrid TV, in terms of a broadcast technology such as satellite, combined with the delivery of on-demand content over broadband. In fact, 2010 could well see the first launch of three-way Hybrid

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TV, combining DTT, DTH and IP, in Eastern Europe. While NDS has long been a proponent of Hybrid TV, it has taken several years for the technologies to mature and enter the mainstream.

Frustrated by the regulatory, technological and other issues that have impeded the rollout of pure IPTV platforms, several European telcos launched DTH services in recent years or still intend to do so. Their plans now include combining the DTH services with their broadband networks. One such example is Romtelecom in Romania, which has one of the most successful DTH platform in the region.

Digitisation and DTT are rapidly changing the face of the huge CEE market, which otherwise has few common denominators, except for its tremendous potential. If one sets aside the complex and highly competitive national markets like Poland, which are closer to their Western European counterparts than their CEE neighbours, the common CEE themes are limited digitisation, low pay-TV penetration, low ARPU and overbearing regulation - or a combination of the above factors.

NDS VideoGuard Express™ is still the technology of choice for new customers in the region

Different products and business strategies are required to cater to all of the market segments, Padrines says. NDS' initial penetration into the CEE markets was primarily thanks to VideoGuard Express™, an entry-level, pre-packaged solution, which is still the package of choice for new customers in Eastern Europe, Russia and the former CIS countries. Having established themselves in their markets, several operators which began with VideoGuard Express are now migrating to the full VideoGuard system, as well as to digital video recorder (DVR) technology from NDS in the form of XTV™, video on demand (VOD) and other more advanced technologies. Such was the case with Serbia Broadband, which is in the process of migrating from VideoGuard Express to a hybrid DTT/DTH platform, with HD Zapper and XTV.

In Poland, with its hyperactive digital market and a higher pay-TV penetration than any other CEE country, NDS has the opportunity to deploy its entire technology offering – CA, middleware, DVR, EPGs and VOD. It already provides systems for the cable operator Aster which has deployed HD DVR and VOD with NDS technologies.

Russia and Ukraine still suffering the effects of recession

Russia and Ukraine are a different story, with their islands of TV maturity and sophistication (such as Moscow and St Petersburg) amidst huge seas of limited digitisation, low pay-TV penetration and even lower ARPU. Still suffering from the effects of the recession, neither country is likely to invest heavily in TV infrastructure in the coming year.

Nevertheless, the size and low starting point of both countries mean that their potential is enormous. NDS is targeting cable and DTH in Russia and Ukraine, primarily with VideoGuard Express, and is offering creative business models to overcome the cash crisis. NDS technology already powers two DTH services in Ukraine - Vision TV and MyTV. In Russia, the cable operator Akado is currently

deploying STBs integrated with NDS EPG, Middleware and CAS, while Sistema/Comstar Direct, one of NDS' original IPTV customers, deployed the Master UI EPG in 2009.

Interestingly, operators coming late to the digital party are often able to leapfrog generations of technology. Digital Fly Ukraine/MyTV for example, launched with an HD DVR STB, entirely bypassing the SD stage.

NDS has to match its product lines to meet the needs of this highly segmented and differentiated market. "There's no doubt that we have to be creative," Padrines says. One way is by creating a clear migration path to cutting-edge TV services for operators that begin with VG Express.

Padrines forecasts very robust growth in CEE markets over the next five years across all platforms – digital cable, DTH, DTT and hybrid. For households which already have a STB, the challenge is to sell them more services and increase ARPU. Many operators cut prices during the economic crisis and now have to recoup their losses by increasing revenue per subscriber. NDS has its work cut out helping them do just that.

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